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Garland, John F. (for Petitioner/Executor Frank E. Gilstrap II)

- (1) First and Final Account and Report of Executor and Petition for Its Settlement,
- (2) for Allowance of Compensation for Attorney's Fees, and (3) for Final Distribution [Prob. C. 10951, 10810 & 11640]

DOD: 2/11/2011	FRANK E. GILSTRAP II, Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting period: 4/5/12 - 1/31/13	
Cont. from Aff.Sub.Wit.  Verified	Accounting - \$177,393.34 Beginning POH - \$174,393.34 Ending POH - \$164,432.29  (\$129,232.29 is cash)	
✓ Inventory ✓ PTC	Executor - waives	
✓ Not.Cred.	Attorney - <b>\$6,231.80</b> (statutory)	
✓ Notice of Hrg  ✓ Aff.Mail W/	Distribution, pursuant to Decedent's Will, and agreement of devisee's, is to:	
Aff.Pub. Sp.Ntc. Pers.Serv. Conf.	Frank E. Gilstrap II - 2003 Chevy Astro Van, 2007 Toyota FJ Cruiser, 1971 Tirlium 12' travel trailer, 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
Screen   4/5/12     Duties/Supp	Marilyn McLaughlin - 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
Objections Video Receipt	Carilyn Weber - 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
CI Report           ✓         9202           ✓         Order	<b>Debra Paul</b> - 25% interest in household furniture, furnishings and personal effects and \$30,750.12.	
Aff. Posting Status Rpt UCCJEA		Reviewed by: KT  Reviewed on: 3/18/13  Updates: 3/19/13
Citation   FTB Notice		Recommendation: SUBMITTED File 1 - Gilstrap

Haught, Rex A. (for Linda M. Strickland – Executor – Petitioner)

(1) Waiver of Accounting and (2) Petition for Distribution Under Will (Prob. C. 11640)

DOD: 9-29-11			LINDA STRICKLAND, Executor with Full	NEEDS/PROBLEMS/COMMENTS:
			IAEA without bond, is Petitioner.	1. Corrected I&A filed 2-11-13
			Accounting is waived	states at #3 that it contains "a portion" (not "all") of the estate.
	Aff.Sub.Wit.		I&A: \$305,500.00 POH: \$305,500.00 (Decedent's	Need clarification: Are there additional estate assets known?
>	Verified		interest in various real property)	additional estate assets known:
>	Inventory		Eve outer (Statutery): Waived	
>	PTC		Executor (Statutory): Waived	
>	Not.Cred.		Attorney (Statutory): Waived	
~	Notice of			
_	Hrg		Distribution pursuant to Decedent's	
>	Aff.Mail	w/o	will:	
	Aff.Pub.		Michael R. Strickland, Successor	
	Sp.Ntc.		Trustee of the Donald W. Strickland	
	Pers.Serv.		Revocable Trust dated 5-24-99 as	
	Conf.		amended and restated on 10-27-09:	
_	Screen		Entire estate	
_	Letters	9-5- 12		
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
~	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
<u> </u>	Status Rpt			Reviewed on: 3-15-13
	UCCJEA	<u> </u>		Updates:
	Citation			Recommendation:
Ľ	FTB Notice			File 2 - Strickland

Jimenez, Miguel (for Mary Perez and Alberto Perez, Jr. – Paternal Grandparents – Petitioners)

Amended Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age:	16		TEMP EXPIRES 3-26-13	NEEDS/PROBLEMS/COMMENTS:
			MARY PEREZ and ALBERTO PEREZ, JR., Paternal Grandparents, are Petitioners.	Need Letters signed by both petitioners.
	Aff.Sub.Wit.		Father: CIRIACO EDWARD MORA	
~	Verified		- Consents and waives notice	
	Inventory		Mother: JENNIFER CASTENDADA	
	PTC		- Consents and waives notice	
	Not.Cred.		Maternal Grandfather: Dan Flores	
~	Notice of		- Personally served 1-25-13	
	Hrg		,	
~	Aff.Mail	W	Maternal Grandmother: Lydia	
	Aff.Pub.		- Notice dispensed 12-13-12	
	Sp.Ntc.		Siblings: Ciera Mora, Jesssie	
N/A	Pers.Serv.		Castenada, Matthew Cavaso, Jada	
<b>&gt;</b>	Conf.		Mora (ages not provided)	
	Screen			
	Letters	Χ	<b>Petitioners state</b> Alexis is autistic and	
>	Duties/Supp		needs special care which Petitioners have provided since 2003. When the	
	Objections		mother had her third child, she did	
	Video		not believe her child was safe around	
	Receipt		Alexis. The mother has had sporadic	
<b>Y</b>	CI Report		visitation. Petitioners have cared for	
<b>&gt;</b>	Clearances		her since elementary school. She is now a junior in high school.	
<b> </b>	Order		Tiovi a jornor irringri scriool.	Paviawad by: skg
	Aff. Posting Status Rpt		Court Investigator Jo Ann Morris filed	Reviewed by: skc Reviewed on: 3-15-13
~	UCCJEA		reports on 12-6-12 and 3-14-13.	Updates:
	Citation			Recommendation:
	FTB Notice			File 3 - Mora

Bob Michigian Living Trust 2/1/08 (Trust)

Poochigian, Mark S (for Petitioner Bryan L. Tahmazian)

Petition for Order Confirming that Property is Trust Asset

		BRYAN L. TAHMAZIAN, successor Trustee, is	NEEDS/PROBLEMS/COMMENTS:
		petitioner.	
		Petitioner alleges:	
Со	nt. from	Bob Michigan, as settlor, created the Bob	
	Aff.Sub.Wit.	Michigan Living Trust by written	
1	Verified	declaration on 2/1/2008.	
Ě	Inventory	Bob Michigan died on 9/28/2008.	
	Inventory	In paragraph 1 of the Declaration of Trust,  the partition of a place of the partition of Trust,  the partition of the Declaration of Trust,  the partition of Trust,  the	
	PTC	the settlor declared that he has "set aside and caused to transfer all of his or her	
	Not.Cred.	rights, title and interest in and to the	
✓	Notice of Hrg	property described in Annex A to the Trust	
<u> </u>	Aff.Mail W/	for the use benefit and enjoyment of the	
_		Beneficiaries named herein." In turn,	
	Aff.Pub.	Annex A of the Declaration of Trust refers to "[p]roceeds from all brokerage and	
	Sp.Ntc.	financial accounts described in Exhibit C	
	Pers.Serv.	attached," and Exhibit C provides in	
	Conf.	relevant part:	
	Screen	Bank of America – Computershare –	
	Letters	Stock - \$4,680 shares account no. XXXX	
	Duties/Supp		
	Objections	Petitioner states California courts have held that a written declaration of trust by the	
	Video	owner of property is sufficient to create a trust	
	Receipt	in that property, and a transfer of title is	
	CI Report	unnecessary when a settlor declares himself	
	9202	to be the trustee of his own property.	
✓	Order		
	Aff. Posting	Wherefore, Petitioner prays for an order:	Reviewed by: KT
	Status Rpt	1. Confirming that title in and to 4,680 shares	Reviewed on: 3/18/13
	UCCJEA	of stock in Bank of America, held in	Updates: 3/19/13
	Citation	Computershare account no. XXXX , is in	Recommendation:
	FTB Notice	Bryan L. Tahmazian, as successor Trustee	File 4 - Michigian
		of the Bob Michigan Living Trust dated 2/1/2008.	

Spaulding, Jill L. (for Petitioner Linda Rachell Richardson)
Petition to Determine Succession to Real Property (Prob. C. 13151)

	Petition to Determine Succession to Real Property (Prob. C. 13151)						
ВО	D: 8/8/2012	LINDA RACHELL RICHARSON,	NEEDS/PROBLEMS/COMMENTS:				
		Successor Co-Trustee of the Fairy					
		Lataine Manfredi Living Trust dated					
		8/4/2012, is petitioner.	1				
Col	nt. from		1. #9a(3) of the petition was not answered re: issue of				
	Aff.Sub.Wit.	40 days since DOD.	predeceased child.				
✓	Verified	No other proceedings.					
	Inventory						
	PTC	Will dated 8/4/2012 devises entire					
	Not.Cred.	estate to the Fairy Lataine Manfredi					
1	Notice of	Living Trust.					
	Hrg	44.5					
✓	Aff.Mail W/O	& A					
	Aff.Pub.	Petitioner requests court					
	Sp.Ntc.	determination that Decedent's					
	Pers.Serv.	100% interest in real property					
	Conf.	located at 1891 20 <sup>th</sup> Street in					
	Screen	Kingsburg passes to her as Successor					
	Letters	Co-Trustee of the Fairy Lataine					
	Duties/Supp	Manfredi Living Trust dated 8/4/2012.					
	Objections						
	Video						
	Receipt						
	CI Report						
	9202						
✓	Order						
	Aff. Posting		Reviewed by: KT				
	Status Rpt		Reviewed on: 3/18/13				
	UCCJEA		Updates:				
	Citation		Recommendation:				
	FTB Notice		File 5 - Manfredi				

Bagdasarian, Gary G. (for Petitioner Kirk Kayajanian)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

	DOD: 6/29/2011		KIRK KAYAJANIAN, named	NEEDS/PROBLEMS/COMMENTS:
			executor, is petitioner.	
			All heirs waive bond.	Note: If the petition is granted, a status hearing will be set as follows:
	t. from		Full IAEA – o.k.	
$\vdash$	Aff.Sub.Wit.	S/P	TOTAL TOTAL	• Friday, May 16, 2014 at 9:00 a.m.
-	Verified		Will dated: 8/10/2010	in Department 303, for the filing of the first account or petition for
===	Inventory		Davida a sa Farana	final distribution.
_	PTC		Residence: Fresno	
1	Not.Cred.		Publication: Fresno Business Journal	Pursuant to Local Rule 7.5 if the
	Notice of			required documents are filed 10 days prior the date set the status
	Hrg		Estimated value of the Estate:	hearing will come off calendar and
V /	Aff.Mail	W/	Personal property - unknown	no appearance will be required.
1	Aff.Pub.		Real property -	
•	Sp.Ntc.		(\$96,500.00)	
F	Pers.Serv.			<b>Note:</b> Inventory and Appraisal has
	Conf.			already been filed.
	Screen		Probate Referee: Steven Diebert	,
√ l	Letters			
<b>√</b> [	Duties/Supp			
	Objections			
\	Video			
	Receipt			
=	CI Report			
+-	9202			
<b>√</b> (	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt	_		Reviewed on: 3/18/13
+	UCCJEA			Updates:
-	Citation			Recommendation: SUBMITTED
F	FTB Notice			File 6 - Kayajanian

Knudson, David N. (for Laura E. Dozier – Spouse – Administrator)

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

	Status Hearing Ke: Filing of the First Acc
DOD: 9-18-07	LAURA E. DOZIER, spouse, was
	appointed Administrator with Full IAEA,
	without bond on 02/04/08. Letters of
	Administration were issued on 02/04/08.
Cont. from 062012,	<b>I&amp;A Partial No. 1</b> filed 12/02/08 reflects
072712, 113012,	\$333,000.00 including real property in
012213	Madera County.
Aff.Sub.Wit.	I&A Final filed 12/02/08 reflects
Verified	\$317,750.00 including real property in
Inventory	Fresno County and various vehicles.
PTC	,
Not.Cred.	(Total I&A: \$647,750)
	On 3-15-12, a Notice of Pendency of
Notice of Hrg	Action was filed stating that a
Aff.Mail	Complaint for Money Due has been
Aff.Pub.	filed in 12CECG00823 MWA to recover
Sp.Ntc.	money lent to the Decedent.
Pers.Serv.	Upon receipt of the Notice of
Conf. Screen	Pendency of Action, the Court set
Letters	status hearing for 6-20-12 for failure to
Duties/Supp	file a first account or petition for final
Objections	distribution.
Video	
Receipt	At hearing on 6-20-12, the Court set status conference on 7-27-12 and
CI Report	ordered Ms. Dozier to be personally
9202	present. Attorney Knudson provided an
Order	address for her.
	Status Report filed 7-19-12 stated that until the Madera County property is sold, there will not be any funds to pay creditors or make distribution, and it is anticipated that with the gradually improving real estate market, it may be possible to sell. Ms. Dozier requested that the administration be allowed to continue.
	At hearing on 7-27-12, Counsel advised that the property consists of 40 acres of undeveloped property in the Coarsegold area, which was appraised at \$333,000, but is worth less. The Court set further status hearing for 11-30-12.
Aff. Posting	At hearing on 11-30-12, OSC was set for 1-22-13 re Laure E. Dozier's failure to communicate with counsel.
Status Rpt X	At hearing on 1-22-13, Ms. Dozier was
UCCJEA	present and the OSC was dismissed. Mr.
Citation	Knudson requested continuance. The
FTB Notice	Court ordered Ms. Dozier and Mr.
	Knudson to be personally present at the continued hearing on 3-26-13.

### **NEEDS/PROBLEMS/COMMENTS:**

Minute Order 11-30-12: Counsel informs the Court that he may have to withdraw as he is not getting any cooperation from his client who is not responding to any telephone calls or letters. The Court accepts counsel's representation that the lack of cooperation from his client is impairing his ability to move forward with this matter. The Court sets the matter for an Order to Show Cause on 1/22/13 regarding Laura Dozier's failure to fulfill responsibilities of administration; failure to communicate with counsel; failure to fulfill duties to beneficiaries, and imposition of sanctions in the amount of \$200.00. The Court orders Laura Dozier to be present on 1/22/13. Continued to 1-22-13 at 9am in Dept 303. Set on 1-22-13 at 9am in Dept 303 for Order to Show Cause Re: Failure to Fulfill Responsibilities of Administration; Failure to Communicate with Counsel: Failure to Fulfill Duties to Beneficiaries: Imposition of Sanctions in the Amount of \$200.00.

#### Minute Order 1-22-13:

Mr. Knudson advises the Court that he still needs additional information from Laura Dozier. He further advises that there is a creditor's claim from Fresno County Federal Credit Union. Mr. Knudson requests a continuance. Matter continued to 3/26/13. The Court orders Laura Dozier and David Knudson to be personally present on 3/26/13. Laura Dozier provides the following contact information to the Court: 1423 Griffith Wy, 93705; telephone # 477-9623. Continued to 3/26/13. OSC is dismissed.

- Need first account or petition for final distribution, or verified status report.
- The Court may require notice of further status hearings on the parties that have requested special notice of these proceedings.

## **Additional Notes:**

Creditor's claims of Fresno County Federal Credit Union, Citibank and American Ambulance have been filed in this matter.

A request for Special Notice has been filed by Sandra Dozier & Fresno County Federal Credit Union.

Reviewed by: skc

**Reviewed on:** 3-15-13

**Updates:** 

Recommendation:

File 7 - Dozier

Sanoian, Joanne (for Petitioner Jennifer Sanchez)

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

Age: 7 years								
Co	nt. from							
	Aff.Sub.Wit.							
✓	Verified							
	Inventory							
	PTC							
	Not.Cred.							
1	Notice of							
Ĺ	Hrg							
<b>√</b>	Aff.Mail	W	/					
	Aff.Pub.							
	Sp.Ntc.							
✓	Pers.Serv.	W	/					
<b>\</b>	Conf.							
	Screen							
<b>√</b>	Letters							
✓	Duties/Supp	)						
	Objections							
	Video							
	Receipt							
	CI Report	N,	/A					
	9202							
✓	Order							
	Aff. Posting							
	Status Rpt							
	UCCJEA	N,	/A					
	Citation							
	FTB Notice							

# THERE IS NO TEMPORARY No temporary was requested

**JENNIFER SANCHEZ**, maternal aunt, is petitioner and requests appointment as guardian of the estate without bond.

**Estimated value of the estate: \$25,000.00** (consisting of a car, furniture and furnishings and bank accounts)

Father: **TONY NAVARRO** – personally served on 2/25/13

Mother: **DECEASED** 

Paternal grandfather: Jose Navarro – served by mail on 2/25/13 Paternal grandmother: Alicia Navarro – served by mail on 2/25/13.

Maternal grandparents: Deceased.

Petitioner states the minor's mother died on 12/13/12. Her revocable trust contains assets to be held for the benefit for the minor. Her estate contains assets that are separate from trust assets. These assets include a car, furniture and furnishings and bank accounts. The exact value of these assets is unknown at this time. Petitioner was nominated as Guardian of the estate of the minor in mother's will dated 1/22/12.

## **NEEDS/PROBLEMS/COMMENTS:**

1. The copy of the will attached to the petition is unsigned.

**Note:** there is no record that the original will has been deposited with the court as required. Probate Code §8200 states the custodian of a will shall, within 30 days after having knowledge of the death of the testator, ... (1) Deliver the will to the clerk of the superior court of the county in which the estate of the decedent may be administered.

**Note:** If the petition is granted, status hearings will be set as follows:

- Friday, July 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- Friday, May 23, 2014 at 9:00 a.m. in Department 303, for the filing of the first account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set, the status hearing will come off calendar and no appearance will be required.

Reviewed by: KT
Reviewed on: 3/18/13
Updates:
Recommendation:
File 8 - Navarro

9A Autumn Petty (GUARD/P)

Atty Atty Case No. 04CEPR00502

Atty Ruth-Heffelbower, Duane (pro per Petitioner/Guardian/paternal grandfather)

Ruth-Heffelbower, Clare Ann (pro per Petitioner/Guardian/paternal grandmother)

Petty, Cheryl (pro per maternal grandmother)

Petition for Termination of Guardianship

Age: 12 years			DUANE RUTH-HEFFELBOWER and CLARE	NEEDS/PROBLEMS/COMMENTS:
			ANN RUTH-HEFFELBOWER,	
			guardians/paternal grandparents, are petitioners.	Need proof of service on Autumn
			permoners.	Petty (minor)
			DUANE RUTH-HEFFELBOWER and CLARE	
Со	nt. from		ANN RUTH-HEFFELBOWER were	
	Aff.Sub.Wit.		appointed guardians on 5/15/12.	
✓	Verified		Father: ANDREW RUTH-HEFFELBOWER –	
	Inventory		served by mail on 1/16/13	
	PTC			
	Not.Cred.		Mother: JAYE RUTH-HEFFELBOWER –	
<b>√</b>	Notice of		consents and waives notice.	
	Hrg		Maternal grandfather: Donn Petty –	
✓	Aff.Mail	W/	consents and waives notice.	
	Aff.Pub.		Maternal grandmother: Cheryl Petty –	
	Sp.Ntc.		consents and waives notice.	
	Pers.Serv.			
	Conf.		<b>Petitioners state</b> Cheryl Petty, Autumn's	
	Screen		maternal grandmother was Autumn's	
	Letters		guardian for many years. Autumn	
	Duties/Supp		wants to return to her care and Cheryl has agreed to file a petition for	
	Objections		successor guardianship.	
	Video		9	
	Receipt			
✓	CI Report		Court Investigator Charlotte Bien's	
	9202		Report filed on 3/15/13	
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 3/19/13
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 9A - Petty

9A

9B Autumn Petty (GUARD/P)

Case No. 04CEPR00502

Atty Ruth-Heffelbower, Duane (pro per Guardian/paternal grandfather)

Atty Ruth-Heffelbower, Clare Ann (pro per Guardian/paternal grandmother)

Atty Petty, Cheryl (pro per Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 12 years			CHERYL PETTY, maternal grandmother, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	
			DUANE BUTU UEFFELDOWED   CLADE ANN	1. Need Notice of Hearing.
			DUANE RUTH-HEFFELBOWER and CLARE ANN	2 Nood proof of porsonal
			<b>RUTH-HEFFELBOWER</b> were appointed guardians on 5/15/12. – Both guardians	Need proof of personal service of the Notice of
Co	nt. from		consent and waive notice.	Hearing along with a copy of
	Aff.Sub.Wit.		consoni and waive names.	the Petition or consent and
1	Verified		Father: ANDREW RUTH-HEFFELBOWER	waiver of notice on:
<u> </u>				a. Andrew Ruth-Heffelbower
	Inventory		Mother: JAYE RUTH-HEFFELBOWER –	(father)
	PTC		consents and waives notice.	b. Autumn Petty (minor)
	Not.Cred.		Maternal grandfather: Dans Betty	
	Notice of	Χ	Maternal grandfather: Donn Petty – consents and waives notice.	
	Hrg		consents and waives notice.	
	Aff.Mail		<b>Petitioner states:</b> granting the guardianship	
	Aff.Pub.		is in the best interest of the minor. The	
	Sp.Ntc.		guardians agree.	
	Pers.Serv.	Χ		
1	Conf.		Court Investigator Charlotte Bien's Report	
	Screen		filed on 3/15/13	
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 3/19/13
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 9B - Petty
				9B

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LeVan, Nancy J., sole practitioner (for Petitioners Ronald Webb and Jeanine Luttrell)

Petition for Appointment of Temporary Conservatorship of the Person and Estate

Age: 83 years			TEMPORARY GRANTED EX PARTE EXPIRES 3/26/2013	NEEDS/PROBLEMS/ COMMENTS:
-			GENERAL HEARING SET FOR 4/23/2013	
Co ✓ ✓ ✓ ✓ ✓ ✓ ✓	nt. from  Aff.Sub.Wit.  Verified Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf.	W/ X	RONALD WEBB, son, and JEANINE LUTTRELL, daughter, are Petitioners and request appointment as Co-Conservators of the Person and Estate with bond set at \$150,784.15.  Estimated Value of the Estate: Personal property - \$125,000.00 Annual income - \$11,820.00 Total - \$136,820.00  Petitioners state the proposed Conservatee was recently taken to Sherman Oaks Hospital [in Ojai] and found to be unable to care for herself, and she was placed on a 30-day hold after a Riese hearing. Petitioners describe several instances of the proposed Conservatee feeling paranoid, engaging in odd	1. Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the Notice of Hearing and a copy of the Petition for Appointment of Temporary Conservator for: Sylvia N. Webb, proposed Conservatee.
✓ ✓	Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order		behaviors due to her fears and illusions, and state that she is a hoarder. Petitioners state proposed Conservatee's finances are in complete disarray as she has not taken care of her affairs since 2006, and her ranch property is in danger of foreclosure because of past due taxes. Petitioners state two persons are taking advantage of the proposed Conservatee, one by trying to get her to sign over her ranch property to him, and the other by living rent-free on the ranch and boarding horses there rent-free.	
	Aff. Posting Status Rpt Petit resid Ron to the Control of the Cont		Petitioners request the proposed Conservatee's residence be changed to the home of Petitioner Ronald Webb, as the hospital is willing to discharge her to the Petitioners' custody as her nominated conservators. (Nomination of the Petitioners filed on 3/12/2013.)	Reviewed by: LEG Reviewed on: 3/18/13 Updates: 3/19/13 Recommendation: File 10 - Webb
			Court Investigator Jennifer Daniel's <i>Report</i> was filed on 3/19/2013.	

Atty Kruthers, Heather H. (for Public Guardian – Petitioner)
Lind, Ruth (court appointed for Conservatee)

Petition for Appointment of Temporary Conservatorship

Age: 85		TEMPORARY GRANTED EX PARTE;	NEEDS/PROBLEMS/COMMENTS:	
		EXPIRES 03/26/13	Need proof of personal service	
		GENERAL HEARING 04/18/13	at least 5 days before the hearing of Notice of Hearing with	
Со	nt. from	PUBLIC GUARDIAN, is Petitioner and	a copy of the Temporary Petition on proposed conservatee.	
	Aff.Sub.Wit.	requests appointment as Temporary Conservator of the Person & Estate.	2. Need Cl report.	
✓	Verified	Conservator of the Ferson & Estate.		
	Inventory	<u>Estimated Value of the Estate:</u>		
	PTC	Personal property - \$ 2,500.00		
	Not.Cred.	<u>Annual income - 29,000.00</u>		
✓	Notice of	Total - \$31,500.00		
ب	Hrg			
<b>✓</b>	Aff.Mail w			
	Aff.Pub.	Guardian received a referral from		
	Sp.Ntc.	Adult Protective Services regarding Mr.		
	Pers.Serv. X	Simpson. An investigation has		
	Conf.	revealed that he has fallen prey to a telephone scam and has		
	Screen	overextended a large credit line on his		
	Letters x	home has fallen behind on his		
	<b>Duties/Supp</b> n/	payments and has failed to pay his		
	Objections	property taxes. Mr. Simpson is also thin		
	Video	and frail, his home is falling into		
-	Receipt	disrepair and he lacks food. He stated		
	CI Report X	that he has not seen a doctor in many		
<u> </u>	PG Report	years and appears to be confused		
	Order X	about normal life conditions. Petitioner	2	
-	Aff. Posting	states that a conservatorship is	Reviewed by: JF	
	Status Rpt	necessary to ensure that Mr. Simpson's	<b>Reviewed on:</b> 03/18/13	
	UCCJEA	finances are managed frugally, to stop	Updates:	
-	Citation	the financial exploitation, and to	Recommendation:	
	FTB Notice	ensure proper personal medical care and food.	File 11 - Simpson	
		and rood.		
		Court Investigator Samantha Henson		
		filed a report on – NEED REPORT.		
I L		I III G G I CPOIT OIL MELD KEI OKI.		

Esraelian, Robyn L. (for Maria G. Resendes – Executor/Pettioner)

(1) Waiver of Accounting and (2) Petition for Allowance of Statutory Fees to Attorney for Executor and (3) Petition for Final Distribution

DOD: 04/10/12		MARIA G. RESENDES, Executor, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner.	CONTINUED FROM 03/12/13
		A constitution of the second	As of 03/18/13, nothing further has
		Accounting is waived.	been filed and the following notes
Cont. from 03/12/13		I&A - <b>\$178,280.53</b>	remain:
	Aff.Sub.Wit.	POH - \$178,280.53	The Petition indicates that some of the beneficiaries named in the will
$\vdash$	Verified	(\$38,280.53 is cash)	are deceased; however, their
	Inventory	,	dates of death were not indicated
<u> </u>	PTC	Executor - <b>waived</b>	in the Petition for Probate as
_			required by Local Rule 7.1.1D.  Need dates of death for:
=	Not.Cred.	Attorney - \$6,348.41	- Rafael Resendes
'   '	Notice of	(statutory)	- Marta G. Fields
_	Hrg	Distribution, pursuant to Decedent's will	- Caridad G. Capote
$\vdash$	Aff.Mail w/	is to:	2. The Petition proposes to distribute
=	Aff.Pub.		the entire estate to Maria G.
_	Sp.Ntc.	Maria G. Resendes - \$38,280.53	Resendes and states that she is the
$\vdash$	Pers.Serv.	cash plus real property	sole beneficiary; however, the
	Conf.		Codicil to the Will dated 12/04/03
-	Screen		appears to devise the decedent's residence to his niece Dr. Mariela
L	<b>Letters</b> 10/05/12		Resendes. Therefore, it appears
	Duties/Supp		that the residence should be
	Objections		distributed to Mariela Resendes.
'	Video		Need clarification.
	Receipt		3. A waiver of accounting has been
	CI Report		filed by Maria Resendes, but it
9	9202 X		appears that Dr. Mariela Resendes
<b>√</b> (	Order		is also a beneficiary of the estate and therefore a waiver of
			accounting is needed from her or
			an accounting will be needed.
			Need clarification.
			4. The Petition does not address
			whether the notice required under
			Probate Code § 9202(b) to the
			Victims Compensation Board is
			needed.
	Aff Doctions		Poviowed by: IE
$\vdash$	Aff. Posting		Reviewed by: JF
	Status Rpt UCCJEA		Reviewed on: 03/18/13
-			Updates:  Recommendation:
$\vdash$	Citation  ETP Notice		File 12 - Fields
*   <b> </b>	FTB Notice		rile 12 - rieids

Ashley, Charlotte (pro per – paternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

	Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)					
Age: 5			GENERAL HEARING 05/01/2013	NEE	DS/PROBLEMS/COMMENTS:	
			<b>CHARLOTTE ASHLEY</b> , paternal grandmother, is petitioner.		Need Notice of Hearing.  Need proof of personal service	
<u> </u>	nt. from		Father: <b>JERMAINE WILLIAMS</b>	f	five (5) days prior to the hearing	
	Aff.Sub.Wit.		Mother: <b>LEJEANA RAMSEY</b>		of the Notice of Hearing along with a copy of the Petition for	
✓	Verified				Appointment of Guardian or	
	Inventory		Paternal Grandfather: Jhonin Williams		consent and waiver of notice or declaration of due diligence for:	
	PTC		Maternal Grandfather: Mark Ramsey	<b>\</b>	Jermaine Williams (Father)	
	Not.Cred.		Maternal Grandmother: Denise Ramsey		<ul> <li>Lejeana Ramsey (Mother)</li> </ul>	
	Notice of	Х	,		, , ,	
	Hrg		Petitioner states: The child has been		UCCJEA does not provide the	
	Aff.Mail		residing with the petitioner for the past		child's residence for the past five	
	Aff.Pub.		year. Petitioner alleges that the child	)	years as required.	
	Sp.Ntc.		does not get the care from his mother he needs. The father is prison.			
	Pers.Serv.	Х	Petitioner alleges that on 02/01 the			
✓	Conf.		mother grabbed the child out of the			
	Screen		car and wanted to the fight the			
✓	Letters		petitioner. 911 was called and a report			
<b>√</b>	Duties/Supp		was made.			
	Objections					
	Video					
	Receipt					
	CI Report					
	9202					
<b>√</b>	Order					
	Aff. Posting				iewed by: JF	
<b>√</b>	Status Rpt				iewed on: 03/18/13	
<u> </u>	UCCJEA				lates:	
-	Citation FTB Notice				ommendation: 13 - Williams	
	LIR NOTICE			riie	13 - Williams	

Case No. 10CEPR00914

Atty Kilpatrick, Patricia (Pro Per – Maternal Grandmother – Petitioner)

Atty Attashian, Zepure (for Elaine Thomas – Paternal Grandmother – Temporary Guardian)

Hopper, Cindy J. (for Rachel Stauffer – Mother) (formerly represented by Atty Jennifer Walters)
Ex Parte Petition for Grandparents Visitations (fam. Code 3104) and Petition to Join
as Party to Guardianship Hearings of Zachary Filga

Ago: 2	TEMPORARY GUARDIANSHIP EXPIRES 3-26-13	NEEDS/PROBLEMS/COMMENTS:
Age: 2		NELDS/FROBLEMS/COMMENTS:
	PATRICIA KILPATRICK, Maternal Grandmother, is Petitioner.	Continued from 10-30-12, 1-22-13.  Trial is also set for 3-26-13.
Cont. from 103012, 012213	ELAINE THOMAS, Paternal Grandmother, is Temporary Guardian.  Petitioner's Ex Parte Petition states she has	Minute Order 10-30-12: Ms. Attashian is also appearing specially for Attorney Martin Gamulin who is representing the father. Ms.
Aff.Sub.Wit.	been active in Zachary's life since he was born; however, she has been denied visits	Attashian informs the Court that the father was not provided notice.
Verified	since the 7-19-12 settlement agreement	Matter continued to 1/22/13 due to
Inventory	between the temporary guardian and the	lack of notice to the father. The
PTC	mother. Petitioner was present at that hearing, but no one discussed her visitation	Court directs Ms. Attashian to advise Mr. Gamulin that he is to be present
Not.Cred.	rights. Petitioner previously had	at the next hearing on 1/22/13.
Notice of	unsupervised overnight visits, and both she	Continued to 1/22/13.
Hrg	and Zachary enjoyed them. He did not cry	Minute Order 1-22-13: Matter set for
Aff.Mail	when being left with her. The visits were	Court Trial on 3/26/13 with a half day
Aff.Pub.	separate from Rachel's visits because Rachel wants to see Zachary by herself.	estimate. The Court directs both
Sp.Ntc.		counsel to exchange witness lists and submit trial briefs by 3/22/13. The
Pers.Serv.	Petitioner states Elaine previously told her	temporary is extended to 3/26/13.
Conf.	that all she had to do was call to see Zachary, but when she requested to see	Parties agree to participate in
Screen	him on 8-19-12, she did not respond. She	mediation regarding the issues of visitation and guardianship on
Letters	sent follow up emails (attached), and	1/29/13 at 2:00 p.m. Set on 3/26/13 @
Duties/Supp	received a message that she couldn't see	1:30 p.m. Dept. 303 for: Court Trial
Objections	him because someone else was visiting that	Temporary extended to 3/26/13
Video	day. Instead, she offered a day that she knew Petitioner could not visit because she	Per Order After Hearing filed 7-31-12,
Receipt	was returning to San Jose.	Mother (Rachel Stauffer) to have unsupervised visitation every
CI Report		Saturday for three months, and
9202	Petitioner states she is now retired and is available through the week to see Zachary.	overnight visits thereafter. The order
Order	To prevent future problems with her right to visit, Petitioner proposes a schedule including visits on Zachary's birthday, and December, and monthly 3-day visits, with	also contains provisions for various holidays and states the father's visitation must be supervised. The trial date was vacated, and a review hearing was scheduled for 1-22-13.
	makeup visits if cancellation occurs. <u>See</u> <u>Petition for details</u> . Exchanges to take place at Janet Appleton's residence or mutually agreed place. Temporary Guardian to	Note: Petitioner (Maternal Grandmother) resides in San Jose, CA. SEE PAGE 2
Aff. Posting	provide medical care information in case of emergency.	Reviewed by: skc
Status Rpt		Reviewed on: 3-19-13
UCCJEA	The Court set the Petition for hearing.  Petitioner to provide appropriate notice to	Updates:
Citation	interested parties.	Recommendation:
FTB Notice	SEE ADDITIONAL PAGES	File 1A - Filgas

## 1A Zachary Filgas (GUARD/P)

Janet Appleton filed a supporting declaration indicating that her home is open for visits.

**Petitioner filed a supplemental declaration on 10-19-12** indicating that since her petition, she has been refused visits unless they are with the mother. Zepure Attashian, attorney for the temporary guardian, told her the reason her visits are being refused is because Petitioner intimidated the temporary guardian by saying she was having her followed. This accusation is not true.

Case No. 10CEPR00914

Petitioner states the temporary guardian knows that Rachel (Mother) will not allow Petitioner to see Zachary during her visits because she is upset that Petitioner supported the petition for guardianship, and feels that if Petitioner is there, Zachary will not bond with her. The temporary guardian's refusal to let Petitioner see Zachary appears to stem from the fact that she was told by Janet Appleton that Petitioner was retiring and planned to move to Fresno to see her daughter and grandson more frequently. Ms. Appleton thought the temporary guardian would be pleased to hear that, but instead was distressed.

Petitioner states she has never been a threat to Zachary or to Elaine Thomas (temporary guardian).

Petitioner proposes a revised visitation schedule. See Declaration.

Mother filed a Declaration on 2-1-13 provides information and requests the temporary guardianship be terminated.

Note: Per Substitution of Attorney filed 2-15-13, the mother is now represented by Attorney Cindy Hopper.

## **NEEDS/PROBLEMS/COMMENTS (Continued):**

1. Petitioner filed "Proof of Personal Service" showing service on the attorneys for Temporary Guardian and Mother, but the parties were not served directly with a Notice of Hearing.

The Court may require continuance for <u>direct</u> service pursuant to Cal. Rules of Court 7.51 and Probate Code §§ 1220, 1214.

1B Zachary Filgas (GUARD/P) Case No. 10CEPR00914 Kilpatrick, Patricia (Pro Per – Maternal Grandmother – Petitioner) Atty

Atty

Attashian, Zepure (for Elaine Thomas – Paternal Grandmother – Temporary Guardian)
Hopper, Cindy J. (for Rachel Stauffer – Mother) (formerly represented by Atty Jennifer Walters)
Court Trial Re: Guardianship and Visitation Atty

C001	i mai ke: Guardianship ana visitation	
		NEEDS/PROBLEMS/COMMENTS:
		EVALUED NOTES NOT DREDADED FOR
		EXAMINER NOTES NOT PREPARED FOR COURT TRIAL
		COURT TRIAL
Aff.Sub.Wit.	!	
Verified	!	
Inventory	1	
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.	!	
Sp.Ntc.		
Pers.Serv.	!	
Conf.		
Screen	1	
Letters	1	
Duties/Supp	1	
Objections	1	
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by:
Status Rpt		Reviewed on:
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 1B - Filgas

1B